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User's Manual

Swiftax™

For Commodore 64 and 128 Computers*
(40 Column, 64K)

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(312) 948-9202

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1 INTRODUCTION

SWIFTAX is a comprehensive, easy-to-use tax preparation program. Whether you file Form 1040EZ (the simplest of the tax forms), Form 1040A or Form 1040, SWIFTAX guides you through the process of preparing your tax return. Once your return is completed, SWIFTAX uses your printer to print your return directly onto IRS forms or onto blank paper.

System Requirements

To run SWIFTAX, you will need:

- A Commodore 64, 64c or 128 (in 64 mode) computer.
- A Commodore 1541, 1571; or MSD dual drive.
- One of the popular printers.

What's in the Package?

Your SWIFTAX package should contain the following:

- One SWIFTAX disk (Sides 1 and 2).
- This user's manual.
- *The Price Waterhouse Personal Tax Adviser* book.
- An update and exchange policy card.
- A SWIFTAX re-order card.
- A Software Registration card, which you must complete and return in order to receive technical support.

If you are missing any of the above, call our Timeworks Customer Support Department for a replacement.

How to Use This Manual

As you read the manual, you will notice that the keys you're instructed to press all appear in rounded corner boxes that resemble the keys on your keyboard. Words that you are asked to type in appear in a **bold type**, selected to resemble typewriter type. The cursor, or arrow, keys will be shown like this: [⇄][↑↓].

Twelve Simple Steps to Filing Your Tax Return

Here is a quick summary of the steps you will go through to get SWIFTAX installed and into action. Once you've read them, you'll realize how comparatively simple it is to complete your tax return with SWIFTAX.

1. First, organize your tax records and other relevant information and have it handy. This information should include:

   - Copies of your tax returns from previous years.
   - Your 1988 W-2 and/or 1099 Forms.
   - Business records
   - Receipts
   - Canceled checks
   - Other records or documents you think you may need.

2. Make copies of both sides of your SWIFTAX disk. The copy of Side 1 will be your program disk and the copy of Side 2 will be your data disk. If you want to prepare tax returns for more than one taxpayer, make additional copies of Side 2 for each additional taxpayer. Each taxpayer must have his or her own data disk.

3. When you're ready to start preparing your tax return, load the SWIFTAX program into your computer, following the instructions in Chapter 2. Now, you're ready to get down to the business of filling out your return.

4. To begin, create a Taxpayer file in the Taxpayer File Information window.

5. Review the SWIFTAX function keys by pressing C= F. These keys will simplify the task of working with the program.

6. Set your System's Configuration.

7. Pull down the FILE menu and select About SWIFTAX to read about completing your tax return. Select the Update File option to read about any last minute changes or additions to the SWIFTAX program which are not in this manual. You can also read about changes in the 1988 tax laws, if any, which may affect your return by selecting "1988 Changes."

8. Then, select the Taxpayer Information option on the FORMS menu and enter the information requested.

9. Before you choose a tax form, read the Eligibility Requirements for each form or schedule in Chapter 4.

10. Next, select the correct tax form from the FORMS menu.

11. Complete the tax forms and schedules following the line-by-line screen directions.

12. Print out and mail your tax return.

And you're finished! That's how easy it is to use SWIFTAX!

2 GETTING STARTED

Installing SWIFTAX

Creating Your Work Program and Data Disks

With its extensive Help screens, SWIFTAX is probably the easiest program you've ever used. However, there are a few steps you need to perform to get up and running with SWIFTAX.

Before you can run SWIFTAX, you will need to make a copy of Side 1 of the SWIFTAX disk and one or more copies of Side 2. Label your copy of Side 1 as the SWIFTAX Program Disk. Label each copy of Side 2 as a SWIFTAX Data Disk.

If you want to prepare tax returns for more than one taxpayer, make additional copies of Side 2 for each additional taxpayer. Each taxpayer must have his or her own data disk.

Once you have made all the copies, put the original SWIFTAX disk in a safe place.

SWIFTAX Copy Programs

If you do not own any copy programs, two copy programs have been provided on Side 1 of the SWIFTAX Program Disk. The instructions for running these copy programs follow.

1. Make sure your computer, disk drive and printer are properly hooked up and turned on.

NOTE: If you are using a Commodore 128, you should be in the C64 mode.

- Turn on your computer, disk drive and monitor.
- Type **GO 64** and press **RETURN**.
- When asked ARE YOU SURE?, press **Y** and then press **RETURN**.

---

2. Insert Side 1 of the SWIFTAX Program disk into your disk drive (Device 8, Drive 0) and close the drive door.

3. If you have only one 1541 disk drive, type **LOAD"1541COPY",8** and press **RETURN**. Otherwise, type **LOAD"OTHERCOPY",8** and press **RETURN**.

4. The copy program will be loaded into your computer. Follow the instructions on the screen to properly copy each side of your SWIFTAX disk.

After copies have been made, put the original SWIFTAX disk in a safe place and use the working disk to load and run SWIFTAX.

Loading SWIFTAX

Loading on a Commodore 128 Computer

To run SWIFTAX, you must be in the 64 mode. To do this:

1. Turn on your computer, disk drive and monitor.

2. Type **GO 64** and press **RETURN**.

3. When asked ARE YOU SURE?, press **Y** and then press **RETURN**.

4. Your Commodore 128 computer should now be in 64 mode.

5. Follow the instructions in "Loading on a Commodore 64 Computer."

Loading on a Commodore 64 Computer

1. Make sure your computer, disk drive and printer are properly hooked up and turned on.

2. Insert your program disk into your disk drive and close the drive door.

3. Type **LOAD"SW",8,1** and press **RETURN**.

4. The SWIFTAX program will be loaded into your computer, and the title screen will appear. Press any key to continue.

5. Follow the disk prompts, pressing **RETURN** after each prompt.

6. If you are running SWIFTAX for the first time, the General Configuration window will be displayed. There are some choices you must make here before you can continue. Refer to the next section, "Creating a Taxpayer File."

   If you have already worked with SWIFTAX, your taxpayer information will be loaded into the computer, and the SWIFTAX menus will appear on the screen.

Creating a Taxpayer File

The General Configuration window will appear if you are running SWIFTAX for the first time.

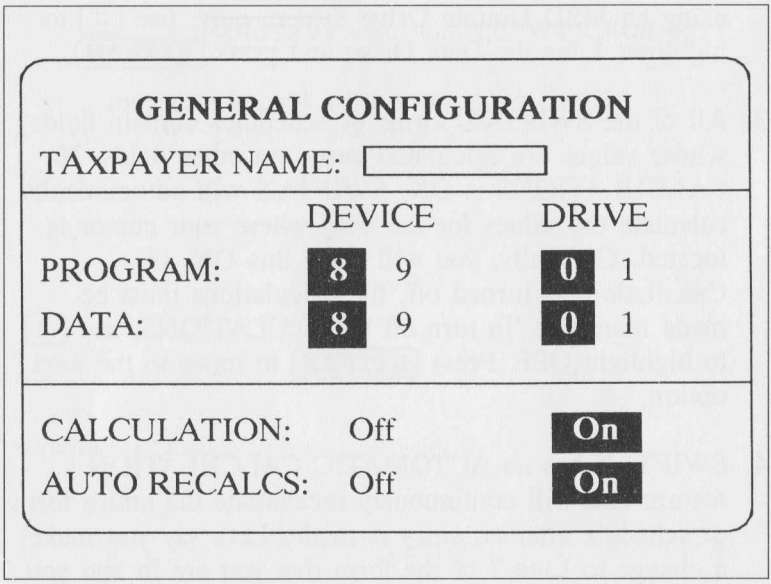

Figure 1

1. Enter a four character Taxpayer I.D. name and press **RETURN**.

2. Next, you must enter your hardware configuration.

   SWIFTAX assumes that you have a one drive system (device 8, drive 0). If this is the case, press [RETURN] four times to accept Device 8, Drive 0 for both your program and data disks. If you plan to load the program or save data from a drive with device number 9, use [⇄] to highlight 9 and press [RETURN]. If you are using an MSD Double Drive System *only*, use [⇄] to highlight 1 for the Data Drive and press [RETURN].

3. All of the SWIFTAX forms or schedules contain fields whose values are calculated based on other fields. If CALCULATIONS is ON, SWIFTAX will automatically calculate the values for the field where your cursor is located. Generally, you will leave this ON. If Calculations is turned off, the calculations must be made manually. To turn off CALCULATIONS, use [⇄] to highlight OFF. Press [RETURN] to move to the next option.

4. SWIFTAX has an AUTOMATIC CALCULATION feature that will continuously recalculate the entire form or schedule after an entry is made. Let's say you make a change to Line 7 of the form that you are in and you have AUTOMATIC CALCULATION turned on. The entire form will be recalculated based on the change for Line 7. All previous values that might have been based on the old value in Line 7 will be overwritten.

To turn AUTOMATIC CALCULATIONS off, use ⇄ to highlight OFF and press **RETURN**. If you turn AUTOMATIC CALCULATIONS off, the only way to recalculate an entire form is by pressing C= R.

5. Press C= S to save your changes and exit from the General Configuration window. The SWIFTAX menus will appear on the screen.

3 GETTING AROUND IN THE PROGRAM

Pull-Down Menus and Quick Keys

SWIFTAX features both pull-down menus and quick keys. Every time you load SWIFTAX into your computer, four menu headings will appear:

FILE PRINT FORMS SCHEDULES

Press the [⇄] arrow keys to move from one menu to another. Once you've selected the menu you want, use the [↑↓] arrow keys to highlight the desired menu option, then press [**RETURN**] to select it.

To the right of each menu option is a Quick Key. You can select any of the menu options by simply pressing the corresponding Quick Key. For example, if you are at the FILE menu heading, press [**C**] to select the Change Taxpayer menu option.

Cursor Movement Keys

The [⇄][↑↓] arrow keys are used throughout the program for moving horizontally or vertically by single steps. These keys may move a highlight or the cursor. When you are working with a form, for instance, the [⇄] keys will move the cursor left or right within the current field, while the [↑↓] keys will move you up to the previous field or down to the next field.

[↑↓]	Next Field
[SHIFT][↑↓]	Previous Field
[⇄]	Next Character
[SHIFT][⇄]	Previous Character

You can use a joystick in port #2 (on the left) as a substitute for the [⇄], [↑↓] and [RETURN] keys. Move the joystick left and right for [⇄] and up and down for [↑↓]. Pressing the fire button is the same as pressing [RETURN].

Function and Command Keys

There are some keys that operate the same way everywhere in SWIFTAX:

[RUN/STOP] or [←]—Escape (located at the upper left of your keyboard).

[RETURN]—Complete entry or select menu option.
[INST]—Insert a character ([SHIFT][INST/DEL]).
[DEL]—Delete a character.
[CLR]—Clear the current field ([SHIFT][CLR/HOME]).
[HOME]—Moves cursor to first character in the current field.

[F1] **Move to the next page**—Press [F1] to move down to the next screen.

[F2] **Move to the previous page**—Press [F2] to move up to the previous screen.

[F3] **Bottom of form**—Press [F3] to jump to the bottom of a form.

[F4] **Top of form**—Press [F4] to jump to the top of a form.

[F5] **Move to the next record** in attachments and lists.

[F6] **Move to the previous record** in attachments and lists.

[F7] **Move to the next field** in attachments and lists.

[F8] **Move to the previous field** in attachments and lists.

[C=][S] **Save & Exit**—Press this to save your entries in all forms, schedules, attachments and the Configuration screens. The data will be saved to disk, and you will return to the menus.

[C=][R] **Recalculate**—Press [C=][R] to redo all the calculations in the entire form. You can do this at any time, whether Auto Recalc is on or not.

[C=][C] Call up the Calculator.
[C=][D] Delete a record in a list or attachment.
[C=][F] View the active Function Keys.
[C=][H] HELP
[C=][Q] Quit
[C=][T] Transfer the Calculator's displayed value to the form.

You can also select Quit from the FILE menu.

Getting HELP

Press [C=][H] to obtain additional information, explanations or instructions for a form, schedule or attachment.

Use [↑↓] to reveal new information a line at a time. Press [F1] to move down a page at a time, [F2] to move up a page at a time, [F3] to move directly to the end of the information and [F4] to move back to the top.

Press [←] to exit the HELP window.

Besides the regular help screens, press [C=][F] to view a summary of all the special keys used in the program. Those function keys that are currently active appear highlighted. Press any key to exit this screen.

The Calculator

SWIFTAX has a built-in calculator so you can make your tax calculations without ever leaving the program. You can use the calculator at any point in the program by pressing [C=][C].

It looks and works much like a real calculator. The calculator performs the following functions:

+	Add
–	Subtract
*	Multiply
/	Divide
[↑]	Raise to a Power (exponentiation key)
:	Change Sign from + to – or from – to +

As you type numbers on your keyboard, they will appear in the calculator window on your screen. Then, press the key for the operation. Enter the second number of your equation and press the [=] key or [**RETURN**]. The answer will appear in the calculator window.

To erase the most recent entry, press [**E**]. To clear everything currently in the calculator, except whatever is in the calculator's memory, press [**C**].

If you enter a positive number, you can change it to a negative number by pressing the [:] key. You must do this, however, before you press the operation key (+, –, *, /, or [↑]). Reverse any sign by pressing [:].

Like many other calculators, this one also has memory and recall functions. To store the result of a calculation, press [**M**]. To recall the number later, press [**R**].

To transfer the number currently on the calculator display into your form or schedule, press [**C=**][**T**].

When you finish with the calculator, press [⬅] to return to the point in your program where you left off.

4 PREPARING YOUR TAX RETURN

Saving Your System's Configuration

You can modify the choices in the General Configuration window at any time. Select General Config from the FILE menu. See the section "Creating a Taxpayer File" for complete instructions on these options. When you are finished making changes, press [C=][S] to save your changes and exit. If you want to use the changes but don't want them saved, press [C=][O].

Reading about SWIFTAX

First, please select About SWIFTAX. The information here will help you complete your tax return.

To view this:

1. Select About SWIFTAX from the FILE menu.

2. Use [↑↓] to move through the information.

3. Press [←] to return to the main menu.

Please read the Update File before you going any farther. The Update File will contain any additional information about this version of SWIFTAX which has occurred since the manual went to press.

To view the update file:

1. Select Update File from the FILE menu.

2. Use [↑↓] to move through the update file.

3. Press [←] to return to the main menu.

1988 Tax Changes

Many of the 1988 tax forms and calculations are different in some way from their 1987 counterparts. To view a summary of these changes:

1. Select 1988 Changes from the FILE menu.

2. Press the [↑↓] keys to move through the summary of 1988 changes.

3. Press [←] to return to the main menu.

The Taxpayer Information Window

Before completing any forms or schedules, you must first enter information into the Taxpayer Information Window. The Taxpayer Information Window records the taxpayer's filing status, name, address, Social Security number, occupation, exemptions, wages, IRA and Keogh contributions, and federal income tax withheld. To complete the Taxpayer Information Window:

1. Select Taxpayer Info from the FORMS menu.

2. Select your filing status. Use [↑↓] to highlight your filing status and press [**RETURN**].

3. The Taxpayer Information Window will be displayed on the screen. Enter your last name and press [**RETURN**]. Enter all other requested information, pressing [**RETURN**] after each entry. If you're not sure what to enter, press [C=] [**H**] for Help.

4. When you have completed the Taxpayer Information Sheet, press [C=] [S] to save your data.

SWIFTAX will automatically display wages, IRA and Keogh contributions, Federal tax withheld in the appropriate fields of your 1040 forms. Any changes to wages, IRA or tax withheld should be made in the Tax Information Window.

Deciding on the Proper Tax Forms

Now that you have entered your Taxpayer Information, it's time to choose the tax return best suited to you. SWIFTAX completes three tax returns: 1040, 1040A and 1040EZ. Read the IRS instructions for the various tax forms and select the one that meets your circumstances.

Form 1040—U.S. Individual Income Tax Return

You must use Form 1040 if your taxable income is $50,000 or more, if you intend to itemize deductions or claim tax credits.

Form 1040A—U.S. Individual Income Tax Return, Short Form

You can use the 1040A form if your taxable income is less than $50,000 and you don't itemize deductions.

Form 1040 EZ—U.S. Individual Income Tax Return

Form 1040EZ is used by single individuals with income less than $50,000, who claim only themselves as a dependent and do not itemize, and whose interest income is less than $400. There are no accompanying schedules.

Completing Your Tax Return

Now it's time to start entering your tax information onto the appropriate tax forms.

Select 1040, 1040A or 1040EZ from the FORMS menu. The selected form will be loaded and displayed on the screen.

Move through the form typing your tax information or accepting automatically calculated entries. Press [RETURN] to complete the entry in each field.

As you move through 1040 or 1040A, you will notice references to other forms, schedules, attachments or lists with the instruction to press [C=][G]. [C=][G] means "go to." The [C=][G] key will LINK you with the associated form, schedule or list. Press [C=][G] and complete the form or schedule. When you have completed the linked form or schedule, press [C=][S] to save and return to the 1040 or 1040A form. If you press [←], you will return to 1040 or 1040A without saving.

Sometimes you may link through more than one form, schedule or list. For example, you may link from Form 1040 to Schedule A and then link from Schedule A to the list for Real Estate Taxes. SWIFTAX will remember all the links that you made.

To move in a schedule or form (in addition to the [↑↓][⇄] keys), press [F1] to move down to the next page and [F2] to move back to the previous page. Press [F3] to jump to the bottom of the current form and [F4] to jump to the top of the form.

In lists and attachments, press [F5] to move to the next record and [F6] to go back to the previous record. To move to the next field, press [F7] and press [F8] to go back to the previous field.

Press [RETURN] to complete or accept each entry. To view the active function keys, press [C=][F].

When you have finished 1040, 1040A or 1040EZ, linking to every necessary form, schedule and attachment, press [C=][S] to save.

You can go back to any form by selecting it from the FORMS menu. The schedules can be selected from the SCHEDULES menu. To access the attachments and lists, move to the line that references the attachment and press [C=][G]. For example, when you are asked to itemize the sales of assets or property in Schedule D, you can move to the line that references that list and press [C=][G]. The Attachment window will appear. Enter the description and quantity, the date purchased, the date of sale, the selling price and the original cost for each sale. When you finish entering your information, press [C=][S] to save the attachment, and the total will appear in the appropriate line.

WARNING: In order to make sure your tax forms are updated properly, we recommend that you work your way down the 1040 Form and "link" into the other forms and schedules as needed.

Schedules for Form 1040A

Schedule 1

Complete Part I if you can claim the credit for child and dependent care expenses.

The most the credit may be is $720 for the care of one qualifying person or $1,440 for the care of two or more qualifying persons.

Complete Part II if your interest income and Part III if your dividend income is over $400.

Schedules and Forms for Form 1040

As you fill in Form 1040, you may need to fill some supporting forms and schedules. Press (C=)(G) when prompted and the form or schedule will appear. Type in the information and then press (C=)(S) to save. The calculated amounts from the accompanying schedules will appear on the line they are linked to. All of the forms and schedules that SWIFTAX completes are described here.

Schedule A—Itemized Deductions

Use Schedule A (with Form 1040) if you itemize your deductions.

If you need to create a supplementary list of your expenses such as medical, taxes, interest and contributions, press (C=)(G) at the appropriate line.

If the total of your itemized deductions exceeds the standard deduction amount, SWIFTAX displays that amount on Form 1040, Line 34. If you find that the amount of your standard deduction is greater than your itemized deductions, do not use Schedule A, and SWIFTAX will enter the standard deduction amount on Form 1040, Line 34.

Schedule B—Interest and Dividend Income

Use this form if you had a bank account or were involved in a foreign trust and received more than $400 in either interest or dividends. Interest income is listed on Line 8 of Form 1040; dividends are then listed on Line 9.

Schedule C—Profit or (Loss) from Business or Profession

If you operated a business or practiced a profession as a sole proprietorship, complete Schedule C.

If you had more than one business, or if you and your spouse had separate businesses, you must complete a separate Schedule C for each business. SWIFTAX allows you to complete up to three separate Schedule Cs. Your selection of each business will determine which name and Social Security number will appear on the top of each schedule.

To enter the principal business codes, select one of the codes on Page 2 of Schedule C that best describes your activity and enter the 4-digit number on Line B.

You will complete Part III, Cost of Goods section (if applicable) before you complete Part I, Income, as stated on the IRS form. The result from Line 8, Part III will be entered in Part I, Line 2.

Schedule D—Capital Gains and Losses

These are profits or losses that you realize on the sale of any property, such as stocks, bonds, a home, cars and boats.

SWIFTAX determines whether the sale of property or assets is a short or long-term capital gain or loss is based on the acquired and sales date you entered for each transaction. SWIFTAX will then automatically calculate the gain or loss and display this information in the correct column.

You can enter up to 69 individual security transactions.

Press [C=][G] on Line 2 to enter sales of assets or property. Enter the description of the asset, the date acquired, the date sold, the sales price (gross sales price less commission or other fees), and the cost or other basis (includes commissions and other fees) for each transaction. Specify whether it is a 1099-B asset or not.

Schedule F—Farm Income and Expenses

Use Schedule F to report farm income and expenses. This includes dairy, poultry, ranches and breeding, among others.

SWIFTAX allows you to complete separate Schedule Fs for you and your spouse. Your selection will determine which name and Social Security number will appear on the top of each schedule.

After some initial questions, you will see Part III, then Part I and then Part II. If you are using the Cash Method, complete Parts I and II only. If you are using the Accrual Method, complete Parts III and II only.

To enter the Agricultural Activity codes, select one the codes on Page 2 of Schedule F and enter the 3-digit number on Line B.

Schedule R—Credit for the Elderly and the Permanently and Totally Disabled

You may be able to use Schedule R to reduce your tax if by the end of 1988:

- You were 65 or over, or
- You were under 65, you retired on permanent and total disability, and you received taxable disability income.

Complete Parts II and III of the schedule if you answered Yes to Lines 2, 4, 5, 6 or 9. Skip Part II if you answered Yes to Lines 1, 3, 7 and 8.

Schedule SE—Social Security Self-Employment Tax

Use Schedule SE to figure any self-employment tax due if:

- You are self-employed (with net earnings from self-employment of $400 or more) or, are an employee of an electing church or church-controlled organization earning more than $100.

- You did not have wages (subject to social security or railroad retirement tax) of $45,000 or more.

Most taxpayers can now use the new short Schedule SE, but complete Section B (long SE) if *any* of the following applies:

- You choose the "optional method" to figure your self-employment tax. See Section B, Part II;

- You are a minister, member of a religious order, or Christian Science practitioner and received IRS approval (from Form 4361) not to be taxed on your earnings from these sources, but you owe self-employment tax on other earnings;

- You are an employee of a church or church organization that chose by law not to pay employer social security taxes;

- You have tip income that is subject to social security tax, but you did not report those tips to your employer; or

- You are a government employee with wages subject only to the 1.45% Medicare part of the Social Security tax.

SWIFTAX allows you to complete up to two separate Schedule SEs. Your selection of each business will determine which name and Social Security number will appear on the top of each schedule.

Form 2106—Employee Business Expenses

File Form 2106 if you are an employee and are deducting the following job-related expenses:

- Outside salesperson expenses.

- Travel, transportation, meals, lodging and other qualified business expenses applicable to this form for an employee other than an outside salesperson.

You need not complete this form if you account to your employer by means of an account book, diary or similar statement and your business expenses do not exceed your reimbursement. See separate instructions for Form 2106.

SWIFTAX allows you to complete separate Form 2106s for you and your spouse. Your selection will determine which name and Social Security number will appear on the top of each schedule.

Part II, Vehicle Expenses will appear first. Enter all of the information for vehicle 1 and 2 (if necessary).

Complete Section B, Standard Mileage rate *only* if you own the vehicle. SWIFTAX will enter the smaller of Part II, Line 3 or 15,000 miles. The other fields are computed automatically by SWIFTAX based on totals from Section A and will enter the result on Part I, Line 1.

NOTE: If Section C is also completed, then the program will enter the larger amount from Lines 15 or 22 to Part I, Line 1.

Complete Section D, Depreciation of Vehicles (if necessary) for vehicles 1 and 2. SWIFTAX will enter the total for each vehicle on Section C, Line 21.

When you complete Section C, Actual Expenses, Lines 16 through 22, SWIFTAX will enter the total from Line 22 on Part I, Line 1.

Enter any excess reimbursement amount reportable as income on Line 9 and manually enter that amount on Form 1040, Line 7.

Form 2441—Credit for Child and Dependent Care Expenses

You may be able to take a tax credit for amounts you paid someone to care for your child or other qualifying person so you could work or look for work in 1988. The credit, which is based on a percentage of the amount you paid during the year, will lower your tax. The most the credit may be is $720 for the care of one qualifying person, or $1,440 for the care of two or more qualifying persons.

Form 8615—Computation of Tax for Children under 14 Who Have Investment Income Over $1,000

Use this form to comply with the new tax law change that requires children to be taxed at their parents' tax rates when the child has investment income in excess of $1,000. Attach Form 8615 to your child's return.

Enter $1,000 for Line 2 if the child did not itemize (if itemized, see the IRS instructions).

Enter the parent's taxable income on Line 6 from either Form 1040, Line 37 or Form 1040A, Line 19.

On Line 7, enter the total, if any, of the net investment income from Forms 8615, Line 5, of *all other* children of the parent.

On Line 10, enter the parent's tax from Form 1040, Line 38; Form 1040A, Line 20; or Form 1040EZ, Line 9.

SWIFTAX will automatically compute Line 18 and enter the larger amount in Form 1040, Line 38 or Form 1040A, Line 20.

Blended families should consult IRS publication 929 for additional details.

The Tax Return Status Window

If you can't remember which tax return forms you have completed, you can find out very quickly using the Status option. Here's how:

1. Select Status from the FILE menu.

2. The Tax Return Status Window will display all the forms and schedules with a checkmark next to those that have been completed.

3. When you are finished viewing, press ⬅ to return to the menus.

Loading Another Taxpayer File

If you are finished with your taxpayer file and want to load another taxpayer file:

1. Select Change Taxpayer from the FILE menu.

2. When you are prompted to insert a new taxpayer file, insert the new taxpayer disk into the disk drive and press **RETURN**.

3. The files from the new taxpayer disk will be loaded, and the main menus will appear. If the new taxpayer disk has not been used before, the General Configuration window will be displayed. Follow the instructions in the section labeled "Creating a Taxpayer File."

5 PRINTING YOUR TAX RETURN

Selecting a Printer

Not all printers and printer interfaces work the same way. What might work for one printer may cause another to print strange characters or not print at all. You can modify printer options in SWIFTAX through the Printer Configuration menu option.

1. Select Printer Configuration from the PRINT menu. The Printer Configuration window will be displayed on the screen.

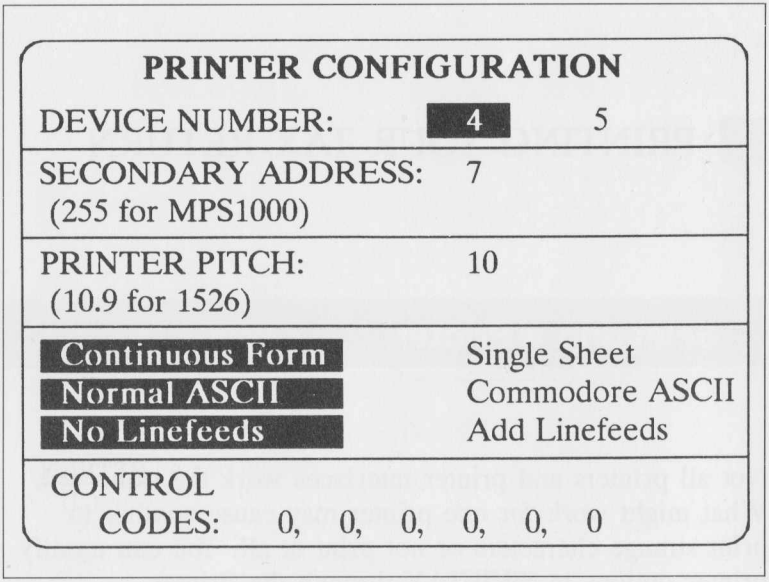

Figure 2

2. The number 4 next to DEVICE NUMBER will be flashing. Most printers use 4 as their device number. Press the [⇄] key to highlight the device number for your printer, if necessary, and press [RETURN].

3. The next option is the secondary address. Most printers use 7 as the secondary address. You may want to modify the secondary address if your interface has trouble operating with this program. (Consult your interface manual for more information on secondary addresses.) Type in the new secondary address and press [RETURN].

4. Next, enter the printer pitch. Printer Pitch refers to the number of characters printed across an inch. Most printers print ten characters per inch, but some print twelve. Consult your printer manual for the proper setting. Type in the printer pitch for your printer and press [RETURN].

5. If your printer uses individual sheets of paper, press the [⇄] key to highlight SINGLE SHEETS and press [RETURN]. Otherwise, highlight CONTINUOUS FORM and press [RETURN].

6. If your printer expects Commodore ASCII characters, highlight COMMODORE ASCII and press [RETURN]. If not, press [RETURN] to accept NORMAL ASCII. Commodore ASCII is Commodore's version of ASCII. The main difference between Commodore ASCII and normal ASCII is the coding used to differentiate upper and lowercase characters.

7. If your printer expects a linefeed after each printed line, highlight ADD LINEFEEDS and press [RETURN]. Otherwise, press [RETURN] for NO LINEFEEDS.

8. If your printer requires some special codes to be sent for printing, type in each code and then press [RETURN]. Usually you will not need to enter any codes. Consult your printer manual for details.

9. When you have made all the necessary choices about your printer, press [C=][S] to save the information.

Printing to Paper

Before printing your tax return onto IRS forms, it's a good idea to print your return on plain paper. You can check your numbers before printing or transferring the information onto the official IRS forms.

NOTE: Because of the layout of the 1040EZ form, it can only be printed with the Print to Paper option.

To print your tax forms onto plain paper:

1. Select Print to Paper from the PRINT menu.

2. A window will display all the forms and schedules with a checkmark next to those that have been completed. Press the [↑↓] key to highlight the form or schedule you want to print and press [**RETURN**]. SWIFTAX will load the data for the form or schedule selected.

3. You will be prompted to align the top of your printer paper with the ribbon. When you are ready, press [**RETURN**], and the form will be printed.

4. When the form is printed, the form selection window will reappear. If you want to print another form or schedule, repeat Steps 2 and 3. To return to the menus, press [⬅].

Printing to Forms

After you have printed on plain paper and assured yourself that everything is properly aligned, you're ready to print onto the actual IRS forms.

1. Select Print to Forms from the PRINT menu.

2. A window will display all the forms and schedules, with a checkmark next to those that have been completed. Use [↑↓] to highlight the form or schedule you want to print and press [**RETURN**]. SWIFTAX will load the data for the selected form or schedule.

3. You will be prompted to insert the selected form into your printer. If your printer can only handle continuous fan-fold paper, tape the form or schedule onto the paper. If your printer can print individual sheets, insert the form into the printer. If your printer uses a printer ribbon, make sure the top of the form is even with the top of the printer ribbon.

4. Press [**RETURN**], and the form will be printed.

5. If the form or schedule consists of two or more pages, you will be prompted to insert the second page into your printer. Repeat Step 3, checking proper form alignment and press [**RETURN**].

6. When SWIFTAX is finished printing the form, the Form Selection Window will reappear. If you want to print another form or schedule, repeat Steps 3 and 4. To return to the menus, press [←].

Printing Attachments

You may decide to print only an attachment instead of the complete form or schedule. To print an attachment:

1. Select Print Attachments from the PRINT menu.

2. A window will display all the forms and schedules that contain attachments, with a checkmark next to those that have one or more completed attachments. Use [↑↓] to highlight the form or schedule whose attachments you want to print and press [**RETURN**]. SWIFTAX will load the attachment data for the selected form or schedule.

3. You will be prompted to line up your printer paper. Make sure the top of your paper is even with your printer ribbon and press [**RETURN**]. Your attachments will be printed. When SWIFTAX has printed your attachments, the menus will appear on the screen.

6 TROUBLESHOOTING

PROBLEM	PROBABLE REMEDY
FILE NOT FOUND	Make sure the file you want is spelled correctly and is in the expected disk drive. Try again.
DRIVE DOOR OPEN OR NO DISK IN DRIVE	1. Make sure the disk is in the disk drive. 2. Close drive door. 3. Try again.
PROGRAM WILL NOT LOAD	1. Turn off the computer and try again. 2. Clean heads on the disk drive. 3. Check computer hook-up. 4. Make sure the PROGRAM disk, not the data disk, is in the drive.
PRINTER DOESN'T PRINT	1. Be sure the printer is plugged in and turned on. 2. Be sure the printer has a ribbon and paper. 3. Turn the printer off and then on again. 4. Check to see that the printer is connected.

OTHER PROBLEMS

Consult the following Pre-Call Checklist before calling Timeworks Customer Support Help Line: (312) 948-9208.

Pre-call Checklist

Before You Call...

1. Have you investigated your manual and the Update File thoroughly (Troubleshooting and the Index) for the answer to your question?

2. Has the problem ever appeared before? What procedure did you use to produce the problem, and can you reproduce the situation? Have you tried reproducing the problem with hardware other than your own?

3. Are you using any additional equipment with your system, such as a joystick? If so, disconnect the additional hardware or software and try to repeat the problem. If not, did you change your hardware or software configurations before you first experienced the problem?

4. If the problem is related to printing, have you checked your printer manual or contacted your printer manufacturer or the answer? Have you read your interface manual or contacted your interface manufacturer?

5. Have you returned your Registration Card to Timeworks?

If You Call...

1. Which Timeworks product are your calling about, and what is the version number? (For example, SWIFTAX for 1988, version 1.) You will find the version number when you view the directory of your program disk.

2. What system are you using? (For example, Commodore 64 with one drive.)

3. Have your user's manual with you when you call, and keep your manual and any other pertinent materials by the phone in case we need to call you back.

If You Write...

Include a phone number where you can be reached during the day.

Disclaimer

This personal computer software program and its manual are intended to provide general information and background and are distributed on the basis that the Timeworks is not engaged in rendering legal, accounting, tax or other professional services.

Should assistance for these types of services be required, the services of a professional advisor should be sought. Timeworks disclaims any personal liability for any advice or information presented herein. Timeworks will not be responsible for any incorrect tax calculations.

References to tax provisions in this program are based on current tax laws and regulations. Revisions in tax laws, if adopted, might affect the tax consequences.

Timeworks does not warrant that the functions contained in the software will meet the Customer's requirements or will operate in the combination the Customer selects for use, or that the operation of the software will be uninterrupted or error-free.

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Customer Support Plan

Please refer to the Pre-call Checklist, which you will find at the end of this manual before contacting us.

If your question involves:

- The operation of any Timeworks program:
  TECHNICAL SUPPORT HELPLINE (312) 948-9208
- Any other non-technical information, back-up disks or update information:
  CUSTOMER SERVICE (312) 948-9206
- Yes, we have a FAX machine to receive facsimiles:
  FAX TRANSMISSIONS (312) 948-7626

These phone numbers may be called during normal business hours—9 a.m. to 5 p.m. Central Time.

If you prefer to write to us instead, be sure to include a phone number where you can be reached during the day.

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6351	Data Manager 2
6352	Word Writer 3
6354	SwiftCalc with Sideways
6357	Writer 64
6361	Partner 64

Timeworks, Inc.
444 Lake Cook Road
Deerfield, IL 60015-4919

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218805MV1